SFA Integrated Product Team Process Description

High-Level IPT Process

Task	Sub-tasks	Deliverables	Organizational Responsibility[1]			
			Channel	CIO	Supplier	Other
Organize IPT[2]	Define project objectives	Team Charter	L			
	Define project risks	Project Risks Project Objectives and Risks Checklist Project Management Checklist	L	P		
	Document project value and measure performance targets	Value Proposition	L	P		
	Document baseline performance measurements	Business Performance Model	L	P		
	Develop/update business case	Business Case Business Case Checklist	L	P		
	Define team composition and organization	Team Organization Chart	L	P		

	Develop project plan	Project Plan
		  – Assumptions
		  – Resource Plan
		  – Risk Mitigation Plan
		  – Schedule and Milestones
		  – Workplan
		  – Roles and Responsibilities
		  – Stakeholder Identification
		Project Plan Review Checklist
		Project Status
			L	P		Other Channels, CFO, CIO

	Incorporate project plan and resources into master IPT schedule		P	L		

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[1] (L=Leads Task, P=Participates in Task)

[2] Start-up activities will be led by the sponsoring channel but all other appropriate channels plus CIO and CFO will "participate".

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SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[1]			
			Channel	CIO	Supplier	Other
	Create task order for contractor participation in IPT		L	P		COTR
	Staff team		L	P		
	Setup team infrastructure − Web Site − LAN Access − Project Team Space − Documentation Tool Access (TBD)			L		
	Identify required team member training	Skills Assessment (still need)	L	P		
	Develop communication plan	Communications Plan Communications Events	L	P		
	Coordinate customer sponsor participation in review	Milestone Review Checklist Milestone Review Document	L	P		

Reviews

Project Kick-Off Review

- Review by project sponsor
- Review project objectives
- Review project plan
- Review team composition and organization

Project Kick-Off Review Criteria

- Project has the sponsorship, definition, funding, and commitment needed to undertake the Concept Design

SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[3]			
			Channel	CIO	Supplier	Other
Concept Design	Document high level business requirements	Requirements Requirements Checklist	L	P		
	Define checkpoints to communicate with, gather input from, and gain buy-in from stakeholders and customer sponsors for design outlines and drafts	Milestone Review Checklist (Planning)	L	P		
	Update project risks	*Project Risks*	L	P		
	Document high-level system flow	Operational (System) Flow (Data Flow Diagram)	L	P		
	Develop quality assurance plan	Quality Plan	P	L		
	Manage project – Manage schedules – Manages budgets – Manage risks – Manage quality – Manage configuration/ versions of deliverables – Report project status	Concept Design Checklist *Project Plan* Project Status	L			Other Channels, CFO, CIO
	Coordinate customer sponsor participation in review	Milestone Review Checklist Milestone Review Document	L	P		
	Maintain master IPT schedule		P	L		
	Train project team members		L	P		

Reviews

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[3] (L=Leads Task, P=Participates in Task)

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Concept Design Review

- Review by project sponsor
- Review by advisor
- Review by appropriate stakeholders
- Review concept design

Concept Design Review Criteria

- Concept Design is approved and agreed upon by stakeholders, including sponsors and advisors.

SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[4]			
			Channel	CIO	Supplier	Other
Business Process Reengineering	Document "as-is" business process flows	Business Process Design As-Is Business Process Flow Roles Description	L	P		
	Document high-level business requirements	Requirements	L	P		
	Document "to-be" business process flow	Business Process Design To-Be Business Process Flow Roles Descriptions	L	P		
	Document gaps between "as-is" and "to-be" business process flows – Determine if data cleansing is needed		L	P		
	Update project risks	*Project Risks*	L	P		
	Refine business case(s) based on reengineering options	*Business Case*	L	P		
	Communicate with, gather input from, and gain buy-in from sponsor, stakeholders, and customer sponsor	Milestone Review Checklist	L	P		
	Develop detailed cost estimate for systems requirements analysis and preliminary system design	*Business Case*	P	L		
	Obtain funding for systems requirements analysis and preliminary system design phases		L	P		
	Manage project	Project Status *Project Plan*	L			

[4] (L=Leads Task, P=Participates in Task)

SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[4]			
			Channel	CIO	Supplier	Other
	– Manage schedules – Manages budgets – Manage risks – Manage quality – Manage configuration/ versions of deliverables – Report project status					
	Coordinate customer sponsor participation in review	Milestone Review Checklist Milestone Review Document	L	P		
	Maintain master IPT schedule		P	L		

Reviews

Business Process Reengineering Review

- Confirm the "To-Be" Business Process
- Confirm the "To-Be" Requirements
    - "To-Be" Business Process Performance Targets
    - Business Case Benefits

Business Process Reengineering Review Criteria

- Business process performance targets are meaningful, measurable, and achievable, and support the Business Case
- Project scope is clear and agreed upon
- Deliverables are well defined and complete enough to enter the next phase
- Sponsors, stakeholders, and subject matter experts have actively participated in, and are satisfied with, outcome of BPR
- Assumptions are consistent (i.e., not in conflict) and are clearly documented

Investment Review Board (IRB)

- Review business process performance targets
- Review updated business case
- Review project costs
- Approve/reject funding for design phases

IRB Review Criteria

- Agreement with baseline performance measurements and future projections (i.e., decreased costs, increased customer satisfaction goals, improved service, etc.)
- Business Case contains credible economic model to project net benefits
- Agreement with future net benefits
- Agreement with project scope, including cost and schedule
- Availability of funding

SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[5]			
			Channel	CIO	Supplier	Other
System Requirements Analysis	Document system performance acceptance criteria	System Performance Acceptance Criteria	L			
	Document business process, quality, training, and ease of use requirements	Requirements	L			
	Document technical infrastructure development and operational requirements – Hardware – Software – Telecommunications	Requirements		L		
	Document deployment requirements	Deployment Requirements Definition	L	P		
	Document training requirements	Requirements	L			
	Update project risks	*Project Risks*	L	P		
	Obtain people resources for preliminary system design phase		P	L		
	Procure hardware, software, and telecommunications for preliminary system design phase			L		
	Update cost estimate for preliminary system design phase	*Business Case*	P	L		
	Train team in design tools		P	L		
	Manage project	Project Status	L			

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[5] (L=Leads Task, P=Participates in Task)

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SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[5]			
			Channel	CIO	Supplier	Other
	– Manage schedules – Manages budgets – Manage risks – Manage quality – Manage configuration/ versions of deliverables – Report project status	*Project Plan*				
	Coordinate customer sponsor participation in review	Milestone Review Checklist Milestone Review Document	L	P		
	Maintain master IPT schedule		P	L		
	Create requirements traceability matrix	Requirements Traceability Matrix	P	L		

Reviews

System Requirements Review

- Review detailed requirements
  - Business process
  - Technical
  - Quality
  - Ease of use
  - Training
  - Deployment
- Review project risks
- Review IV&V report

System Requirements Review Criteria

- Requirements sufficiently detailed
- Project risks and issues manageable
- Packages sufficiently meets review criteria
- IV&V report issues satisfactorily resolved

Independent Verification and Validation (IV&V) Review

- Determine level of IV&V support
- Obtain IV&V support
- Verify software requirements analysis deliverables
- Develop IV&V report

SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[6]			
			Channel	CIO	Supplier	Other
Preliminary System Design	Design detailed business processes	Business Process Design	L			
	Identify new/modified roles and new skills	Roles Description	L			
	Create inventory and description of components to be built – Human/computer interface – Data model – Programs, screens, reports, scripts, procedures, etc. – Training curriculum and modules – Technical architecture		P	L		
	Document deployment approach based on preliminary deployment approach from business case	Deployment Approach	P	L	P	
	Document testing approach	Testing Approach	P	L		
	Document data cleansing and conversion approach	Data Cleansing and Conversion Approach	P	L		
	Develop cost estimate – Cost of all subsequent phases – Deployment costs – Training costs – Technical infrastructure	*Business Case*	P	L		

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[6] (L=Leads Task, P=Participates in Task)

SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[6]			
			Channel	CIO	Supplier	Other
	acquisition and installation costs					
	Install development hardware, telecommunications, and software			L		
	Manage project – Manage schedules – Manages budgets – Manage risks – Manage quality – Manage configuration/ versions of deliverables – Report project status	Project Status *Project Plan*		L		
	Coordinate customer sponsor participation in review	Milestone Review Checklist Milestone Review Document	L	P		
	Create development/ implementation task order		P	L		

Reviews

Preliminary Design Review

- Validate business process flow and supporting build components. Validation techniques could include:
  - Design walkthrough/workshop
  - Prototyping
  - Simulation
  - Model office
  - Role playing
- Review data conversion approach
- Review testing approach
- Review IV&V report

Preliminary Design Review Criteria

- Business process continues to support value and success measures identified in concept initiation
- All of the components necessary to support the new business process have been identified and described in enough detail to assess complexity to build it
- Project risks and issues are manageable
- IV&V report issues satisfactorily resolved

Investment Review Board (IRB)

- Review business case
- Review estimated project costs
- Approve/reject project detailed design, build, test, and deployment funds

IRB Review Criteria

- Agreement with baseline projections
- Agreement with future net benefits
- Agreement with project scope, including cost and schedule
- Availability of funding

Independent Verification and Validation (IV&V) Review

- Determine level of IV&V support
- Obtain IV&V support
- Review system design documents
- Develop IV&V report

SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[7]			
			Channel	CIO	Supplier	Other
Detailed System Design	Design in detail components to be built – Human/computer interface – Data model – Programs, screens, reports, scripts, procedures, etc. – Training curriculum and modules – Technical architecture	ERD Diagram Program Detailed Design Screen Detailed Design Report Detailed Design Procedures Detailed Design	P	P	L	
	Develop unit test plans	Unit Test Plan			L	
	Develop production capacity plan (hardware, print, telecommunications, etc.)	Production Capacity Plan	P	P	L	
	Prototype critical technical architecture components				L	
	Update communications plan	*Communications Plan*	L			Communications
	Develop deployment plan	Deployment Plan	L	P	P	
	Revise cost estimate	*Business Case*	P	L	P	
	Manage project – Manage schedules – Manages budgets – Manage risks – Manage quality – Manage configuration/ versions of deliverables – Report project status	Project Status *Project Plan*		L		

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[7] (L=Leads Task, P=Participates in Task)

SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[7]			
			Channel	CIO	Supplier	Other
	Coordinate customer sponsor participation in review	Milestone Review Checklist Milestone Review Document	L	P		
	Develop learning design plan	Learning Design Plan Learning Design Checklist	P	L	L	
	Develop help desk strategy		L	P		
	Develop conversion strategy		L	P		
	Maintain master IPT schedule		P	L		

Reviews

Critical Design Review

- Review detailed designs of components to be built (take sample of designs if necessary)
- Review critical calculations or process steps
- Review important customer-facing components for user-friendliness
- Review IV&V report

Critical Design Review Criteria

- Components designed cover complete scope of project solution
- Detailed design thorough and complete
- Sources of data for conversion identified and mapped
- Screens, forms, and reports are user-friendly
- IV&V report issues are satisfactorily resolved

Independent Verification and Validation (IV&V) Review

- Determine level of IV&V support
- Obtain IV&V support
- Verify detailed system design documents
- Develop IV&V report

SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[8]			
			Channel	CIO	Supplier	Other
Build and Test	Build and test system components		P	P	L	
	Develop deployment procedures	Deployment Procedures	L	P	P	
	Develop computer operations procedures	Computer Operations Procedures		P	L	
	Prepare test data	Unit Test Status Report Unit Test Script Testing Checklist	P	P	L	
	Document integration test plan	Integration Test Plan	P	P	L	
	Track and manage fixes and their severity		P	P	L	
	Manage project – Manage schedules – Manages budgets – Manage risks – Manage quality – Manage configuration/ versions of deliverables – Report project status	Project Status Project Plan	P	L	P	
	Coordinate customer sponsor participation in review	Milestone Review Checklist Milestone Review Document	L	P		
	Prepare volume/stress test plan	Volume/Stress Test Plan	P	P	L	
	Develop training classes		L	P	P	
	Create structure for help desk		P	L		
	Maintain master IPT schedule		P	L		

[8] (L=Leads Task, P=Participates in Task)

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Reviews

Integration Test Readiness Review

- Review samples of test results
- Assess severity and volume of open problems
- Assess readiness of interfacing systems to participate in Integration Test
- Assess completeness of components
- Assess readiness of test data
- Review IV&V report

Integration Test Readiness Review Criteria

- The scope, specific assumptions, and considerations for each level of application integration testing are clearly defined
- The test environment(s) model the production environments as closely as possible, including production-sized databases, production LAN configurations, office setup, and all automated and manual processes
- Detailed integration test workplan exists
- Severity and volume of open problems acceptable to proceed
- Interfacing systems prepared to participate in integration test or acceptable work-around in place
- IV&V report issues satisfactorily resolved

Independent Verification and Validation (IV&V) Review

- Determine level of IV&V support
- Obtain IV&V support
- Verify unit test results
- Develop IV&V report

SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[9]			
			Channel	CIO	Supplier	Other
Integration Test	Perform integration test – Test external interfaces – Test internal interfaces – Test operations components (schedules, backups, etc.) – Test business process organizational handoffs/ interfaces	Integration Test	P	P	L	External Orgs
	Track and manage fixes and their severity		P	P	L	
	Perform volume/stress test	*Volume/Stress Test Plan*	P	P	L	As appropriate
	Plan acceptance test	Acceptance Test	L	P	P	
	Train team in testing processes and tools		P	L		
	Manage project – Manage schedules – Manages budgets – Manage risks – Manage quality – Manage configuration/ versions of deliverables – Report project status	Project Status *Project Plan*	P	L	P	
	Coordinate customer sponsor participation in review	Milestone Review Checklist Milestone Review Document	L	P		
	Maintain master IPT schedule		P	L		

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[9] (L=Leads Task, P=Participates in Task)

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Reviews

Acceptance Test Readiness Review

- Review samples of test results
- Assess severity and volume of open problems
- Assess readiness of interfacing systems to participate in deployment
- Assess completeness of deployment procedures
- Assess readiness of test data
- Review IV&V report

Acceptance Test Readiness Review Criteria

- The test environment(s) model the production environments as closely as possible, including production-sized databases, production LAN configurations, office setup, and all automated and manual processes; difference with target production environment pose no known issues
- Severity and volume of open problems acceptable to proceed
- Data sent and/or received was successfully processed
- Interfacing organizations successfully integrated with new/revised business process
- IV&V report issues satisfactorily resolved

Independent Verification and Validation (IV&V) Review

- Determine level of IV&V support
- Obtain IV&V support
- Verify system integration test results
- Develop IV&V report

SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[10]			
			Channel	CIO	Supplier	Other
Acceptance Test	Conduct acceptance test		L	P	P	
	Communicate deployment plans		L	P		Communications
	Conduct training classes		P	P	L	
	Test deployment (e.g., dry run)		L	P	P	
	Test data conversion		P		L	
	Coordinate customer sponsor participation in acceptance test		L			Customer sponsor participants
	Deploy production technology infrastructure			L	P	
	Manage project – Manage schedules – Manages budgets – Manage risks – Manage quality – Manage configuration/ versions of deliverables – Report project status	Project Status *Project Plan*	L	P	P	
	Coordinate customer sponsor participation in review	Milestone Review Checklist Milestone Review Document	L	P		
	Maintain master IPT schedule		P	L		

[10] (L=Leads Task, P=Participates in Task)

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Reviews

Production Readiness Review

- Review feedback from customer sponsors
- Review performance compared to anticipated value and success measures
- Review converted data
- Assess readiness of technology infrastructure
- Assess readiness of affected organizations and people
- Assess severity and volume of open problems
- Channel approves/rejects system deployment
- Review IV&V report

Production Readiness Review Criteria

- Project value and success measures reasonably expected to be met or exceeded
- Deployment procedures and programs tested
- Accuracy and completeness of converted data
- Severity and volume of open problems acceptable to proceed
- IV&V report issues satisfactorily resolved

Independent Verification and Validation (IV&V) Review

- Determine level of IV&V support
- Obtain IV&V support
- Verify acceptance test results
- Verify system software readiness for implementation
- Develop IV&V report

SFA Integrated Product Team Process Description

Task	Sub-tasks	Deliverables	Organizational Responsibility[11]			
			Channel	CIO	Supplier	Other
System Deployment	Execute deployment plans		L			
	Transition workforce to new roles and responsibilities		L			
	Deploy new procedures		L			
	Deploy application – Configure application – Install technology infrastructure – Verify technology infrastructure			L	P	
	Manage project – Manage schedules – Manages budgets – Manage risks – Manage quality – Manage configuration/ versions of deliverables – Report project status	Project Status *Project Plan*	L	P	P	
	Coordinate customer sponsor participation in review	Milestone Review Checklist Milestone Review Document	L	P		
	Maintain master IPT schedule		P	L		
	Evaluate lessons learned		P	L		
	Monitor first live cycle		L	P		

[11] (L=Leads Task, P=Participates in Task)

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Reviews

Post Implementation Review

- Evaluate what worked, what didn't work
- Evaluate the success of the IPT processes
- Evaluate expectations versus actual

Post Implementation Review Criteria

- Project value and success measures reasonably expected to be met or exceeded